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ABSTRACT

This document contains three papers on challenges facing human resource development today. "In Difficult Times: Influences of Attitudes and Expectations Towards Training and Redeployment Opportunities in a Hospital Retraction Programme" (Sandra Watson, Jeff Hyman) presents reasons behind the low uptake of training and redeployment opportunities in a mental health hospital downsizing. It examines social-psychological effects on barriers and motivation to training and re-employment and reports on a number of extrinsic and intrinsic factors that inhibit staff from leaving the hospital. "A Qualitative Study of Nonexempt Employees: Careers or Jobs?" (Kimberly S. McDonald) discusses the results of an exploratory study of career development activities, concerns and needs of nonexempt employees, which included a continuum of needs and interests regarding career development. "Is Work Sharing a Better Option for Organizational Development?" (Steve L. Whatley, Chan Lee, Lisa Moten) reports on interviews conducted with and observations of German organizational development employees. The implications of the paper indicate that work sharing is successful in Germany and that human resource development professionals should conduct further research into work sharing as a viable alternative to employee layoffs. All three papers include bibliographies. (AJ)

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In Difficult Times: Influences of Attitudes and Expectations Towards Training and Redeployment Opportunities in a Hospital Retraction Programme

Sandra Watson
Napier University of Edinburgh, Scotland

Jeff Hyman
Glasgow Caledonian University, Scotland

This paper reports on research which explores reasons behind the low up take of training and redeployment opportunities in a three-year downsizing (retraction) programme in a National Health Service (NHS) mental health hospital. It examines the social-psychological effects on barriers and motivation to training and redeployment. It reports on a number of extrinsic and intrinsic factors that are inhibiting the movement of staff from the hospital.

Key Words: Motivation, Barriers, Training

Organisational change may be seen as a 'normal' consequence of survival and development in a rapidly changing world. In many situations this change can involve organisational downsizing. There has been a tendency to view the strategic decision on whether or not to downsize in a rather 'clinical' manner in terms of a 'rational' calculation of the benefits and costs to the organisation as a whole. Many organisations will implement a range of support mechanisms to ease the human side effects of this transition. While it is now commonplace to speak of the human costs of change (Deal & Kennedy, 1999), little attention has focused on the emotional impact of change nor on examining how the personal feelings and emotional consequences of downsizing impact on programmes designed to ease transitions.

The research is set in the context of a three-year downsizing (retraction) programme in a National Health Service (NHS) mental health hospital, which is resulting in a substantial reduction in staffing levels. Many staff are expected to re-skill, move to community work and/or move to another location, stimulating a range of personal reactions. In order to facilitate this transition, a number of training and development initiatives have been devised by management to prepare staff for alternative employment. The desired outcomes of these initiatives were to phase the dispersal of staff in line with ward closures and to minimise the impact of closure on staff by providing opportunities to retrain and/or move to alternative employment. However the number of staff utilising these facilities was very limited and the dispersal of staff was not meeting expected targets. This research explores reasons behind the low up take of training and redeployment opportunities.

Research Questions

The central research question involved exploring how and why employees respond to radical organisational shifts. The aim of this research was to identify behavioural influences impacting on take-up of training and alternative employment opportunities, in a downsizing context. Key contentions of this paper are that traditions of employment security will provoke negative responses to the retraction programme; uncertainty in the work environment will influence the uptake of training, development and redeployment opportunities, and staff may vary in their orientation toward alternative employment opportunities according to identifiable criteria (e.g. age, education, position).

The first proposition derives from two main conceptual areas; firstly, there has been recent debate about the nature of the "new psychological contract" which helps inform employee behaviour (Rousseau, 1994; Hiltrop, 1996). There is an assumption that under turbulent market conditions, the "old" psychological employment contract based on security and continuity cannot be sustained. In order to engage employee commitment, new dimensions (e.g. of "employability") to the contract need to be explored (See Herriot, 1992; Herriot et al, 1998). Until recently, the profile of a "good employer" centred on notions of job and income stability, security and advancement with seniority. In many respects, the UK public sector epitomised this characterisation (Millward et al, 2000). With changing and uncertain market conditions, the "good employer" concept has shifted to one that can best meet changing product market conditions through adaptable working conditions and employment flexibility, whilst employee orientations may be hypothesised to be located in traditions of security and long-term career progression.

The second related proposition derives from literature on emotional impacts of hospital closures (Maurier and Northcott, 2000; Doherty, 1998; Massey, 1991). These impacts may then be associated with the parallel concepts of

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motivation to train and *barriers* to training. In other words, rather than acting as a stimulus to action, the threat of imminent or protracted change serves as an inhibitor to action. Furthermore, structural factors such as age, social class, education and occupation have been identified as variables affecting learning (Maguire et al, 1993; Maguire and Fuller, 1995) and these factors underpin the third proposition of differential response paradigms.

Context

In 1990, the UK government introduced the Community Care Act, advocating the closure of large institutions for people with learning difficulties by providing residents with care and accommodation in the community. This case study is located in a large hospital, for individuals with learning difficulties, which is two years into a three year retraction programme. It is changing from being a large hospital with over 300 residents to a 26-bed unit. This process involves patients being relocated across Scotland, with major implications for retraining and redeployment of staff. Many staff at this hospital are long-serving, and the hospital itself was founded many years ago. The hospital is regarded as a significant presence as well as contributor to the local employment community. Further, many of the staff employed live in and around the local area. It is perhaps not surprising that there is a tangible (though currently fragile) sense of "community" among staff.

In order to ease this transition a range of training, development and redeployment initiatives were developed with the key objective of assisting staff to manage the transition from the hospital to community working or to alternative employment. The hospital has been awarded nearly £17m to support this retraction process. It has established a number of initiatives to assist staff to seek training and development or to offer alternative employment opportunities. These include:

- A monthly bulletin of redeployment opportunities from other hospitals and community care providers throughout Scotland. These are mainly in the area of community care and support services.
- A redeployment service, which enables staff to seek assistance with finding suitable alternative employment.
- A careers advisory service, designed to give advice on career alternatives and practical assistance.
- A training and development programme developed by management, provides opportunities for further training, secondments and educational opportunities.
- A resource pack detailing programmes and support available for further/ retraining and education opportunities, supplemented with a resource centre providing advice on assistance available for training and redeployment on an individual basis. This also gives details of alternative employment prospects.

Although a great deal of effort and resources have been allocated to try to ease the transition for staff, a substantial number of staff do not appear to be taking up opportunities for training, development or redeployment. This paper exposes and explores the behavioural issues underpinning the low uptake of opportunities.

Theoretical Framework

It is the conjecture of this paper that social-psychological factors derived from employee perceptions of fracture of the "old" psychological contract based on security and service will strongly influence the motivation to take up training, development and redeployment opportunities. The effects on staff of impending contraction or closure of an established workplace can be profound. Sennett (1998) presents evidence of profound emotional damage among a group of "downsized" programmers at IBM. One American study found that threatened job loss is accompanied by a number of transitional stages, involving disbelief, sense of betrayal, confusion, anger and ultimately, resolution (Schlossberg and Leibowitz, 1980). A later study of a hospital closure found that "all of the above stages were experienced by various staff members after the scheduled closure was announced. Everyone had to achieve resolution and accept imminent closure as a fact" (Domingue and Singleton, 1994,p.51). Expressed feelings were akin to those of unwanted divorce: "Losses were very personal and were intimately related to our self-esteem, self-worth and personal economic conditions. The situation was devastating" (Domingue and Singleton, 1994, p.53). A British study among psychiatric nurses found that, the impending loss resembled that of bereavement. Like the American case reported above, this study also found a reactional sequence among those affected: anticipatory grief; acute mourning stage in nurses physically distanced from the hospital; refusal to accept closure as "right"; and a strong identification with the old hospital (Massey, 1991). "Survivor" syndrome in health service restructuring exercises has also been identified in several studies (Maurier and Northcott, 2000; Massey, 1991), where individuals report a sense of guilt at remaining in the organisation. Studies by Massey (1993), confirm that: "the effects of run-down and closure on hospital staff are profound and far-reaching, and many nurses find the transition from hospital to community nurse very difficult indeed" (Massey, 1993, p.198). Feelings of "institutional loss" as Massey (1991) describes the syndrome, can be especially profound among long serving employees, working in a long-established environment. Motivation under these circumstances may be difficult to sustain but motivation is recognised in the

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literature as an important contributor to training take-up and outcomes: yet surprisingly little attention has been given as to why training "works" for some individuals and not for others. However, recently some attention has been given to the influence of "emotions" on learning (Short, 2001). Arguably there is an integral link between motivation and emotions, with motivation being influenced by an individual's emotional state. On the basis of a number of research studies, it has been contended that "attitudes and expectations represent the most powerful barriers to the willingness to consider training" (Crowder and Pupynin, 1993, p.26).

Specific barriers to learning have been identified in the literature and these include motivation (Hand et al, 1994), itself derived from both intrinsic and extrinsic factors (Mumford, 1988), as well as structural factors such as age, social class, education and occupation (Maguire et al., 1993). Intrinsic barriers can be owned and erected by the learner and these are therefore factors over which they have control. On the other hand, extrinsic or environmental barriers are outwith the locus of their individual control. In this way, it follows that the variables that are present in relation to the intrinsic values can lead to diverse perceptions of the extrinsic factors. For example, the perceptions, motivations and emotions of one individual compared to another may dictate a different response to a physical or situational barrier according to his or her locus of control. Emotional barriers to learning are associated with individual insecurities, which may cause reluctance to take action in certain areas and hence hamper participation. Crowder and Pupynin (1993), using Rotter's (1966) definition, propose that 'individuals with an internal locus of control believe performance to be contingent on their own behaviour while individuals with an external locus of control believe that outcomes are beyond their personal control' Crowder and Pupynin (1993, p.19). Through their inter-action with attitudes and expectations for the future, the socio-psychological factors identified above represent an additional potential barrier to training. A key issue is the importance of individual motivation in learning (Hand et al, 1994). For some people there is a sense of inertia and/ or saliency of learning, where they do not perceive learning as a means of helping them out of their present situation, which influences their individual motivation to learn. Factors affecting individual commitment include motivation, awareness, flexibility, information and guidance available as well as perceived benefits from learning. Additionally, Maguire et al (1993) highlight barriers to learning as being funding, fear of loss of job security, and finding time to study.

Basically, therefore, staff are facing new and highly significant dimensions to their immediate (psychological) and contextual (public sector/hospital /community) employment conditions which in turn are likely to influence employee attitudes and behaviours toward retraining initiatives. In other words, the potential *social-psychological* effects of retraction may be profound and their influence on the overall uptake of training cannot be under-estimated.

Methodology

An interpretive research perspective is adopted, aligned to the social constructionist paradigm which assumes that individuals and their interactions subjectively create social reality which assumes an underlying pattern and order, or regulatory focus (McGoldrick, Stewart and Watson, 2002). The researchers are seeking to understand the emotions of staff and their subsequent response to training and redeployment initiatives within the particular social construct of a hospital retraction. No single method was appropriate to produce the rich texture required to explore the issues, therefore the following complementary quantitative and qualitative approaches founded upon a case-study methodology were adopted.

An initial survey was designed to assess the overall levels of awareness and satisfaction with the secondment and redeployment opportunities and retraining provision and take-up. Respondents were asked to indicate any suggestions for improvement if they were dissatisfied with any options for retraining. A total of 27 respondents (23%) offered some narrative response to this question. The self administered survey instrument was issued to all 411 employees; a response rate to the survey of 29% was achieved, which would conform with accepted response rates in internal postal surveys of this nature (Easterby-Smith et al, 1991). The data was analysed to identify if there were significant differences between different variables of category of staff, gender, age, education level and length of service. The results indicated that there were few differences. Differences which did emerge are presented in the discussion section of this paper. Of the 119 completed questionnaires, 18% were from men, and 82% from women. This is representative of the total sample, where the gender split is 20% male, 80% female. The mean age of staff was 37 years and nearly half (47%) of respondents were aged between 31-40 years. Mean length of service was 12 years, with 40% of staff having served between 11 and 20 years at the hospital. Nearly two-thirds (62%) of respondents were from nursing, a further 17% from support services and ten per cent from Professions Allied to Medicine (PAMs). The rest were from Administration and from Management.

The survey was complemented with a series of interviews on a purposive sample of staff. Four group interviews were conducted with samples of nursing personnel and support staff in order to identify the main obstacles and facilitators facing different groups of staff to retraining for employment elsewhere. These involved not more than

five staff in each group and provided opportunities for occupational groups to express their feelings about the programme and its effects upon them.

Individual semi-structured interviews were also conducted with eight management representatives, one union representative and one care leader (all serving on the Hospital Training and Development Group), to examine their views on staff responses to training and development opportunities. These interviews were recorded and transcripts of the interviews made. Phone interviews were conducted with a small sample of staff who had successfully transferred into alternative employment or taken up educational opportunities. In addition to these formal interviews, several informal interviews with hospital personnel were conducted in order to gain specific information or to clarify particular issues. Table 1 below provides details of the interview respondents.

Table 1. *Interview Respondents*

	No. respondents	Male	Female	Management
Phone interviews	5	2	3	-
Face-face interviews	10	4	6	8
Group interviews (4)	16	4	12	-

Research Findings

Responses to the Retraction Programme

Behavioural responses to the retraction programme as identified through individual and group interviews can be identified under the following headings.

Stress and Sickness. Stress and sickness among staff was very apparent. In the words of one respondent: *"The sickness rate is going through the roof".* Even if on paper a service was adequately staffed, in practice cover was constantly being sought and: *"Nobody seems to listen to that. It's so frustrating... A lot of my time is spent in long-term sick interviews".* Concern was also expressed about the psychological effects of the retraction programme. The support group of staff reported that many of their colleagues felt that they were taking their stress home to their families. According to one interview group, sickness and absence rates were now at an all-time high, a situation predicted to get worse until the final closure. One nurse stated that: *'Staff are still living on their nerves."* A manager queried whether the extent of stress among fellow managers was recognised, especially as there had been a number of stress and health related problems among this group.

Morale and Motivation. Morale among all the interview groups was also at a very low level. One group reported that although they knew that closure was inevitable, they felt an overwhelming sense of powerlessness. Attempts at involving them in the decision-making process were treated with scorn, as these were viewed as "cosmetic democracy". Another nurse group considered that their lack of input had left them feeling demoralised. Staff powerlessness was exacerbated as the groups felt that their opinions and concerns were either being ignored or not fully addressed. Further "blows" to morale were continually anticipated through the uncertainty inherent in their situation: *"What we want to know is – do we have a job? How long do we have it?"* The difficult situation was summed up by one nurse: *"I used to love my work, but now I don't do things like coming in early".*

Low morale was also affected by staffing problems as nurses struggled to maintain high standards of patient care, this being a highly sensitive issue which emerged at several points during the group interviews. Study days had been reduced, study leave requests declined and courses cancelled, which meant that nurses became concerned about skills erosion at precisely the time when they wished to update and develop their skills. Conversely, low morale was linked directly with low motivation for taking up various retraining and redeployment opportunities, which were reluctantly pursued under pressure, rather than through individual choice. Another group pointed out that fear of the unknown was a strong inhibitor to many people moving on. The support staff group expressed the view that they had no motivation to make use of any of the retraining and redeployment opportunities. As with the staff interview groups, there was clear understanding among the managerial respondents that morale and motivation were intervening factors in staff behaviour.

Stereotyping and Self-esteem. The three nurse groups expressed concern that working for the hospital had pigeon-holed or negatively stereotyped them in the minds of prospective employers, thereby reducing job opportunities. Some interviewees said that this made them feel almost unemployable ("institutionalised"), although

they knew that they had accumulated valuable skills over their service period with the hospital. This issue was also mentioned by several management respondents: *"Learning disabilities is very much a second class citizen as far as certificates go. We are not accepted as 'real' nurses"*. However, some management respondents were critical of staff attitudes: *"some are not interested in taking opportunities, they are sitting back, possibly due to their age"*. Age as a factor was also referred to by another manager: *"Probably a quarter to a third will not move. They are too old to train and they are not interested. Anyone over 45 shows little interest. The most active are lower than 42."*

Locus of Control. One of the findings was a propensity of respondents across all groups to have an external locus of control in that individual shortcomings were attributable to changing organisational and environmental factors beyond the reach of staff. These factors in turn were eroding existing relationships at the workplace. The nature of the hospital, in which long serving patients and staff had enjoyed a strong sense of community had changed and all the interview groups felt that the sense of community was rapidly dissipating: *"This was a great place at one time, but they've wasted it"*. In contrast, a common thread joining all the respondents who had been successful in finding alternative employment was their conviction that their success was primarily as a result of their individual effort and perseverance.

Denial. Denial in one form or another was frequently cited by managers as an obstacle: *"There is a significant number of staff who do not appear to have absorbed the implications of the closure, and would prefer not to believe that major change is underway"*. Others believed that facing the reality of the managerial narrative of change might only occur when appointments are made to the permanent 26-bedded unit. People who are not offered a job will be forced to face the inevitable. Another manager pointed out that the pace and extent of staff acceptance will grow as closure grows closer. Another respondent considered that *"a lot of people are putting their heads in the sand"* whilst others referred to the "*comfort zone*" of familiarity that many are loathe to risk leaving: *"It's opened up a whole new world of insecurities for them"*. Fear constitutes an additional factor, especially for older and long-serving staff: *" A lot of them are so fed up and demoralised, that they just don't know where to turn"*

The potentially devastating effects on staff are recognised by management: *"..to recognise how it must feel for somebody who has worked in a location for 30 years, has cared for ...patients for that period of time ... It is like giving your children up for adoption but you don't actually want to give them up. You don't know where they are going.. you are never going to see them again and you don't actually feel that they are going to a better home ... you have been told to do it and that is quite a hard thing for people to come to terms with.. I think that this is actually overlooked and we don't spend enough time and energy on understanding that. And it's just because we don't have the people, resources or the time to do it "*.

Opportunities for Redeployment and Retraining

The attitudes and responses of staff towards "opportunities" provided by the retraction programme were uniformly negative. To examine the extent to which these reactions were independent of recognition or access to the various programmes offered to staff and their perceived value, the study attempted to identify levels of awareness, utility and perceptions of support offered.

Awareness. Survey respondents were first asked to nominate their degree of awareness of training initiatives. The findings indicate that the majority of staff were aware of the principal initiatives available to them. This is especially the case for the high proportions of staff either very aware (33%) or aware (62%) of the Redeployment Bulletin. The survey asked respondents whether they were aware of different retraining opportunities offered within the hospital. 81% were aware of the provision for vocational qualifications, 79% for "Return to Learn", and 84% for secondments. Individualised training opportunities were known by 61% of staff, demonstrating that levels of *awareness* were reasonably high.

Utility and Availability. Whilst the majority of respondents replied that the initiatives are useful or even very useful, an appreciable minority replied that the initiatives were "of no use". Again, the Redeployment Bulletin tends to secure the highest levels of utility. The resource pack and redeployment bulletin were not regarded as especially relevant by any of the redeployed respondents, being seen as too general and not sufficiently focused on specific skills. The Resource Centre was mentioned by some respondents as being useful, for example, for computer training. The respondents who had successfully been redeployed were of the overall opinion that information provision regarding training and redeployment options were effective, although there was criticism of specific informational instruments and of the limited role played by the hospital in helping staff to secure alternative employment or retraining.

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Substantial levels of criticism with regard to redeployment were expressed by all the interview groups. One problem was skills matching, in that vacancies circulated in the Redeployment Bulletin failed to meet staff needs. Both the bulletin and questionnaire were seen as unhelpful in this regard. From the questionnaire there were concerns that no systematic attempt at targeting or skills matching had been made. This matching problem between staff skills and vacancies, especially with regard to qualified staff, who work in a very specialised area was also a common management concern: *"The opportunities coming through will not reflect their skills, but, "there is nothing we can do about it"*. Other comments were more favourable: "*... Everyone filled in a preference exercise questionnaire and any jobs or secondments are matched up to what individuals had put in these forms – they're targeted"*.

Organisational Culture/ Support. There were a number of organisational culture issues identified from the research, in relation to notions of support and sense of community. Many individuals perceived problems with level and appropriateness of opportunities. An interviewee who gained employment following a secondment claimed that she set up this opportunity on her own, "*without any support from the hospital*". A second interviewee secured their position by applying for a job she had seen advertised in a newspaper, claiming that her success was "down to luck", rather than the help given by the hospital. She also claimed that there were obstacles: that it was difficult to get time off to take up training opportunities and make use of facilities such as the resource centre or careers advisory service. This point was echoed by a third respondent who also did not feel very supported by hospital. She also took the view that securing alternative employment was very much due to individual effort and initiative. Conversely, two respondents who were redeployed were complimentary of the hospital support. One related that he was transported to the potential employer, offered a three month trial without obligation and the opportunity to return to the hospital if the post proved unsuitable. The second secured his position through the redeployment questionnaire, allowing him to be targeted for the vacancy.

Accessibility. When asked whether respondents were *satisfied* with opportunities for retraining and redeployment, a majority of those aware replied affirmatively, suggesting that overall there is a reasonable level of satisfaction. However, the perceived effects of accumulating staff reductions on secondments were having a widespread influence on accessibility to opportunities, according to a number of survey respondents. A Registered Nurse pointed out that she had: *"Twice applied for vocational training and was unsuccessful on both occasions as there were no staff in my present ward interested... I don't think this is acceptable in a retracting hospital.. "*

One effect of staff resource constraints, according to a few respondents, has been the cancellation of courses, which can impact negatively on morale. When asked the reasons why one nursing group experienced no great motivational surge to take up retraining opportunities, one nurse pointed out that: "*When you approach them (ward management) they tell you can't be released*". The rest of this group confirmed that this is a major problem, leading to a considerable amount of dissatisfaction and false hope. Management also identified shortages of staff adversely affecting retraining and redeployment opportunities: *"Releasing staff to allow them to take up training has been a consistent problem and difficulty*". Staff shortages present a significant barrier to taking up training and development opportunities: "*people had an awful time trying to get study time*". Another manager pointed out that shortages may deter staff from taking up opportunities due to them putting patients first *"The staff member may see a shortage of nurses and decide that they will not add to the problem, as they feel the patients will suffer."*

One nursing assistant pointed out that: *"Secondments – there is no staff so people can't get release for secondments."* One concern expressed by a number of groups was that taking a secondment could jeopardise a return to employment: "*They say your job's safe, but people are not convinced*". The group claimed that little support, help or guidance was offered to staff seeking secondments, even to the point of staff organising their own secondments. Chronic (and growing) staffing shortages were also felt to hinder the release of staff. The choice of secondments was also stated to be limited by the nurse groups, not giving staff the opportunity to sample alternative careers. The support staff were unhappy that a secondment on alternative employment was for three months with no room for flexibility, if it is unsuitable.

Discussion

Our original assumption was that there may be distinctive patterns between groups, based on occupation, education or qualifications. However, the survey and interview findings found very little distinction in responses according to these variables. All groups cited the devastating effects of closure upon staff. These effects apply to staff from across the age range and with a range of occupational backgrounds, qualifications and service records. Notwithstanding these uniformities, there were some identified differences: long service staff in the older age range were not surprisingly concerned about their immediate financial situation and responded less positively to retraining and redeployment opportunities. Successful transferees indicated age and length of service as relevant factors in

respondent willingness to seek alternative employment, coupled with the view that few older staff (in support services) were mobile in terms of car ownership.

There are advantages and disadvantages of an extended closure programme. On one hand staff have time to adjust in a number of ways to a radically changed situation: conversely, the protracted "slow death" may demotivate staff especially when resources tighten and opportunities for transfer become fewer and less accessible. Many of the symptoms reported in the literature review on hospital closures have been found in this study. Refusal to accept that closure is right or morally legitimate (Massey, 1991) was demonstrated through concerns raised regarding the welfare of patients and the impending loss of community. At present a number of staff, some who have had close contact with patients over a number of years, feel that patient care is being compromised by the retraction. It is believed among some staff that this is an issue that management are either not aware of or refuse to consider.

Current levels of uncertainty concerning future employment opportunities were rife across all groups which for some is providing a (perhaps unconsciously) justification for inaction, which can be seen to be similar to Schlossberg and Leibowitz's (1980) "confusion" stage. There were also persistent comments that many of the staff were continuing in their current employment in expectation of generous severance or early retirement packages. An identified obstacle to staff movement is the reluctance of some (especially with long service records) to forfeit potential redundancy money if they move to employment out with the health service.

Respondents *believe* that negative stereo-typing of hospital staff outside the trusts might constrain employment opportunities and is impacting on self-worth and self -esteem (Dominigue and Singleton, 1994). Evidence from successful transferees suggests that this may be an internalised self-image rather than a genuine significant constraint.

The literature identifies a number of stages in the "institutional loss" process. These stages involve disbelief and denial, feelings of betrayal, confusion and anger prior to arrival at resolution (Schlossberg and Leibowitz's, 1980). The findings indicate that with respondents, there still persist an amalgam of largely negative emotions concerning the closure and for many the stage of resolution has yet to be attained. This is despite the varied and extended efforts of management to inform and consult with staff. Arguably, resolution will only come when staff know what their likely outcomes will be in terms of continued employment, severance packages and early retirement terms. Over one-third of respondents claimed not to have been informed at all about future provision and three-quarters not to have been consulted over this critical issue.

Staff shortages, coupled with reportedly growing levels of absence and sickness, were compromising efforts to redeploy and retrain staff. Many respondents were not actively pursuing training or employment opportunities, for any of a combination of the reasons outlined above.

In addition, the availability and utility of specific information and devices were questioned. This is resulting in staff being disinclined to use many of these facilities. Although there were no real criticisms of secondments and training conceptually, staff identified a number of practical or operating constraints acting against their effectiveness, including inadequate resources, especially staff shortages, and insufficient contact and support.

The most intractable factor, from which a number of sub-factors extend, concerns the morale of staff and their motivation to take positive steps to withdraw from the hospital. Evidence from diverse sources confirms that morale and motivation of staff are at low levels. The old psychological contract based on security and continuity still resonates for many staff whose careers and lives are integrally mixed both with the hospital and their local community. Both these life-enhancing symbols are in a state of fracture as a consequence of the retraction.

Success in securing alternative employment appears to be positively related to personal initiative in seeking and pursuing opportunities, displaying an internal locus of control (Crodwer and Pupyin,1993). All these respondents considered that they had been successful primarily through their own efforts, and whilst the hospital may provide channels for matching or retraining, these will be of little use without the initiative and effort of individuals.

The group interviews confirm a number of the issues raised in the survey. Whether the negative aspects identified above through the staff interviews were completely accurate reflections of the situation or not are in some ways irrelevant. People's behaviour will be related to their *perceptions* of situations and it is clear from our findings that these perceptions were affecting staff orientations towards the retraction programme. Whilst there is evidence of convergence of views between staff and management respondents, there are signs of a gap in perceptions, especially over the extent to which staff should take responsibility for their own advancement or should be guided and assisted by the hospital. As one manager put it: "We *have 150 qualified nurses, but there aren't going to be 150 posts for learning disabilities nurses either in the community or the hospital. People have to get that through their heads and realise they're going to have to think about transferable skills*" Other managers offered similar dependency culture views along the lines of: "*People have to focus on what they are going to do for themselves*" and: "*Some people are quite innovative in what they are doing, others want to be spoon fed.. the Trust has a responsibility to do that, but I think there's an onus on them as well*".

Conclusions

The study has demonstrated that even with a well-resourced programme with which employees are familiar and to which they are generally positively inclined and exercised with obvious goodwill by senior staff, the management of a major retraction programme confronts significant barriers. Prime among these are the social-psychological orientations of staff especially when pressures extend over a protracted period of time. There does appear to be individual characteristics, centred on the concept of 'locus of control' which are important in helping to determine staff outcomes. Whilst it is impossible to discern the reasons why some individuals display more of these qualities than others at any one time, or whether these are inherent or learned, the hospital is attempting to activate these individual characteristics among its staff. This is important as our evidence indicates that staff who do pursue alternative opportunities tend to be successful, at the very least, in obtaining interviews. One of the key issues to emerge from this study is the importance of understanding the profound emotional influences of closure/retraction on individuals. It would appear that a structured perspective was taken to the implementation of support mechanisms, with less attention being paid to confronting the devastating emotional consequences of their well-intentioned programme. This unintentional neglect is resulting in incomplete realisation of the programme.

This research makes a contribution to HRD in a number of ways. First, the findings from this case study can be used to inform other HRD directors in the health services sector who are likely to face or to implement retraction. Second, it adds to the literature on barriers and motivation to learning, by taking a focus on provision of training and development in a traumatic context, providing scope to develop our understanding of the emotional dimensions of motivation. It can also make a contribution to the work on barriers and facilitators to organisational change, through identifying key emotional intrinsic orientations of staff potentially affected by change.

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A Qualitative Study of Nonexempt Employees: Careers or Jobs?

Kimberly S. McDonald
Linda M. Hite
Brad Gilbreath
Indiana University-Purdue University Fort Wayne

This qualitative exploratory study investigated career development activities, concerns, and needs of nonexempt employees. The study focused on work and career satisfaction and the potential role of career development activities. Results revealed a continuum of needs and interests regarding career development and reinforced the importance of further research on this key population. Nonexempt employees are the lifeblood of organizational output. Therefore HRD practitioners are urged to devote more attention to the career development of these often-overlooked employees

Key words: Nonexempt Employees, Career Development, Human Resource Development

Despite apparent similarities in subject matter between human resource development and traditional career development theory, there has been little crossover in research or in practice (Boudreaux, 2001). Typically, much of the research that has been conducted regarding career theory has focused on career choice, developmental stages, and environmental influences; while the majority of career development studies in HRD have concentrated on the career progression of those in managerial and/or professional positions (Allred, Snow, & Miles, 1996; Wentling, 1996) or on early career goals and aspirations.

There are some similarities between the work of career theorists and HRD researchers. Both, for example, have begun to explore gender differences in careers, which has led to recognition of the influence of family responsibilities on career choices and progress. However, few studies in either field have focused on the career development of blue-collar and nonexempt employees (DeSimone, Werner, & Harris, 2002) and even fewer have examined the impact of HRD initiatives on these individuals' careers. The purpose of this study is to explore how nonexempt employees perceive their careers and how HRD/CD initiatives may influence their careers.

The lack of attention to the career concerns and needs of nonexempt employees is puzzling. Nonexempts comprise more than half of the workforce for many organizations. Moreover, they often produce the organization's products or provide its services, making them the closest link to the customer base. Traditionally, managerial talent, particularly at the highest levels of the organization, has been viewed as the most valuable human resource, and therefore the focus of most HRD initiatives. More recently, however, a competitive global marketplace and changing economic conditions require organizations to attract and retain the best employees at all levels. Front-line employees increasingly are asked to take on more responsibilities to ensure product and service quality, efficiency, and innovation. As a result, organizations are beginning to recognize the nonexempt workforce as a potential source of competitive advantage. Leibowitz, Feldman, and Mosley (1992) reinforced this thought when they wrote: "In an era when 'working smart,' flexibility, and efficiency are prized characteristics of any workforce (blue-collar or white-collar, manufacturing or service), organizations cannot afford not to examine more closely the career development needs of their nonsalaried workers" (p. 334).

As compelling as the argument is that organizations need their nonexempt workers for economic success, an equally important consideration involves reciprocity and fairness. For example, Wooten and Cobb (1999) argue for integration of organizational justice literature into career development theory and research. They write:

> By its very nature, CD involves basic issues of fairness over the allocation of CD resources, the policies and procedures used to decide who receives them, and the interactions between those who provide and those who not only receive CD rewards but also experience its losses (p. 173).

Clearly, nonexempt employees are stakeholders in their organizations, as are their exempt and managerial associates, yet they typically have fewer opportunities for enhancing their skills in current positions or for career development. The paucity of substantive research on this segment of employees suggests that they have been ignored or overlooked in most HRD efforts. Respondents to a survey conducted by the American Society for Training and Development indicated that only 36% of hourly employees were covered by their organizations' career development systems (Gutteridge, Leibowitz, & Shore, 1993). Leibowitz, Feldman, and Mosley (1992) wrote:

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> In these fast-paced times it is not difficult to find organizational career development programs that address the increasingly varied career needs of executives, managers, technical and administrative professional employees . . . The same cannot be said, however, of the nonexempt population in many organizations. . . These employees' career development concerns have not typically been the focus of intensive examination by HR professionals; indeed, the tacit assumption in many organizations appears to be that this population has no significant long-term aspirations that need to be addressed by the organization's career development staff (p. 324).

Thomas (1989) concurred that this population has been neglected by organizations and suggested "few organizations subscribe in practice to the idea that low-level, non-supervisory employees have or even want careers" (p. 354). However he believed organizations should be concerned with "blue-collar careers" because these workers do "accumulate skills . . . over time and are concerned about the meaning of their work experiences" (p. 355).

HRD professionals are in a position to advocate for increased emphasis on the development needs of nonexempt employees. However, they need more information to draw from if they are realistically to consider investing HRD resources into the large and varied group that are categorized as nonexempts. One goal of this study is to add to the small body of knowledge currently available.

Theoretical Framework

To more clearly understand the careers of nonexempt employees, it is important to look at their job expectations. Only a few studies have examined what blue-collar or nonexempt employees want from their jobs. Loscocco (1990) found that both blue-collar women and men ranked job security and good pay as the most important of eight job characteristics. HR professionals have indicated that strong work relationships positively influence job satisfaction for nonexempt employees (Leibowitz, et al., 1992). These HR professionals also perceived many nonexempts as being frustrated with their careers – citing issues such as perceived lack of mobility, lack of knowledge regarding ways to improve their careers, and the inability to think about career options. However, it is important to note that the Leibowitz et al. study represented the view of HR practitioners rather than direct reports from nonexempt employees.

Several studies have suggested that HRD initiatives can assist employees in their career development. For example, managerial men and women frequently cite the importance of mentors to their career advancement (Gordon & Whelan, 1998; Ragins, Townsend, & Mattis, 1998; Wentling, 1996). Tharenou, Latimer, and Conroy (1994) found that training opportunities led to promotions. Informal learning opportunities such as "stretch assignments" or overseas experiences also have assisted managerial men and women to advance in organizations.

However, little is known about the impact of HRD interventions on nonexempt employees. In their study of women employed in trades, Greene and Stitt-Gohdes (1997) noted that "formal career education and/or counseling was not a factor in participants' decisions to choose the trades" (p. 274). Hite and McDonald (2001) found few HRD initiatives cited by women in front-line positions as assisting them in their careers. Olesen (1999) indicated that employees who move from blue to white-collar positions typically do not receive training about adapting to their new cultures.

Both Green and Stitt-Gohdes' (1997) and Hite and McDonald's (2001) studies were qualitative in design, grounded in emergent data. Jerich (2000) conducted a quantitative study assessing the professional development needs of secretarial employees at a large university. These employees indicated a need to develop business and budgetary skills to advance in their careers as well as a need to continually update their computer and technology knowledge and skills. Additionally, these secretarial employees cited time as the greatest barrier to their professional development. While this study focused on perceived needs and barriers to professional development, it did not examine the impact these interventions might have on secretarial employees' careers.

Case studies of successful career development programs for nonexempts suggest that the programs have been successful. For example, Russell (1984) reported that evaluation data regarding Lockheed's career development program indicated improvement in work quality and quantity, morale, and communication with managers and co-workers. Leibowitz, et al. (1992) cited data from an employee survey indicating improvement in the career planning process to argue for the effectiveness of Corning's career development program for nonexempts. However, both of these reports provide anecdotal information and report the data from HR's perspective.

Situated within the larger context of HRD research and practice, our study is an attempt to contribute to a better understanding of how white-collar dominated views of careers mesh with the experiences of nonexempt employees. We hope to identify ways the HRD community can better serve the needs of nonexempt employees and the organizations employing them. Thus our study is an initial step in answering a fundamental and important question:

How can HRD practitioners better meet the developmental needs of the nonexempt workforce?

Research Questions

This study explored the career experiences of men and women in nonexempt positions. The lack of established scholarship on nonexempt employees led us to other sources of inquiry. As a result, the questions developed were based on a review of the few studies that have targeted non-managerial employees as well as extrapolation from research on those in management positions. The questions posed were focused on what nonexempts want from their work and what activities have helped them in their careers. The term "career" used in the questions was defined to the participants as referring to paid or unpaid work. The following questions were addressed:

- What is important to you in your work?
- Looking back over the jobs you have had, are you satisfied with where you are now? Why or why not?
- What activities have you participated in to help in your current or future work?
- What has been the effect of these activities on your current work experience or your plans for future work?
- What additional activities would be most helpful for your career?

Methodology

We employed focus group discussions to gather data related to nonexempt employees' career development. Limited research data in this area necessitated a qualitative approach. Focus group methodology is recommended when the study is exploratory and when "factors related to complex behavior or motivation" are being examined (Krueger, 1994, pp. 44-45). We wanted to obtain data that "emerges from the group" (Krueger, p. 45), rather than imposing our own frame of reference on the data. Focus group discussions provide a forum where subjects can interact with one another in a non-threatening and candid manner (Lederman, 1990).

Human resource representatives from three organizations solicited volunteers to participate in this project, with the only parameter being that the potential participants be nonexempt employees. Three focus groups involved men and women employed in a large financial company, two consisted of employees in a mid-size manufacturing company, and the final group was nonexempt employees of a state university.

Each focus group began with a brief overview of the purpose of the discussion and our definition of careers. The five major questions listed above were presented. Each focus group lasted for 1-1½ hours. Company representatives set these time constraints, which may be a limitation of the study. However, there was sufficient time to obtain responses from all participants regarding each question, and we began to hear redundancies in responses by the end of each focus group discussion.

Brotherson and Goldstein (1992) recommend using multiple researchers as a "form of triangulation" when using focus group methodology (p. 337). Therefore, at least two researchers were present at each focus group discussion. One researcher served as moderator, while the other took notes. Throughout the discussion, both the moderator and note taker verified participant responses using clarifying questions, additional probes and paraphrasing. Additionally, he note taker summarized the responses for each question before the facilitator proceeded with the next query (Krueger, 1993). Participants were instructed to clarify or correct any misinterpretations. Immediately following each discussion, a debriefing between the moderator and note taker took place to discuss "first impressions" and to compare and "contrast findings from earlier focus groups" (Krueger, 1994, p. 128). The discussions were tape recorded for review and preparation of complete transcriptions. Each researcher analyzed the transcripts independently to determine patterns emerging from the six groups. We used the constant comparative method (Merriam, 1998), comparing comments within and between focus groups to develop tentative categories. The researchers then shared their observations and findings.

Demographics

Each focus group in this study had 6-10 participants, for a combined total of 49. Within the 49, we had a small amount of racioethnic diversity: 14% of participants self-identified as black, 80% as white, and 6% did not respond. The total group included 33 women and 16 men. Not surprisingly, the financial institution had more female representation, and the manufacturing company included more males.

Participant ages ranged from 18-62, with nearly half (49%) in the 31-50 range, 27% under 30 years of age, and 22% at 51 or older (2% did not respond). Over 60% of our participants had been with their companies for ten years or fewer. At the other end of the spectrum, approximately 10% indicated employment of over twenty years.

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A query about educational background indicated that 37% had completed high school or a GED. Nearly equal numbers had completed post high school education (22%) or associate degrees (24%). Fourteen percent held bachelor's degrees.

At the end of each focus group session, participants were asked to respond in writing to brief statement sets about careers and career planning. The percentage of participants responding is listed to the left of each statement. The first set inquired about how (or if) the current job fits into a career plan:

27% I have a job, but I don't think of it as a career

29% I am in this job for now, but I have other plans for my career

43% This job is part of a career path I have chosen to follow

1% No response

The second set of items asked how much thought respondents had given to careers:

22% I have not done much thinking about my career direction and plans

78% I have done a lot of thinking about my career direction and plans

A high correlation can be made between these two groups of questions, noting that 72% of the participants think in terms of a career plan when considering their current jobs and 78% report having given thought to career direction. These results are particularly interesting in light of assumptions often made about nonexempt employees' lack of career awareness.

Results

It is clear from our interviews that psychologically enriching work is important to many nonexempt employees. Important factors mentioned were: knowing one has done a good job, gaining a feeling of accomplishment, being appreciated, as well as having challenge and task variety. Not surprisingly, nonexempts often mentioned income and security as being important. They noted the importance of having a job that permits taking care of self and family, offers good benefits, and provides job security.

The respondents told us that liking your work and enjoying co-workers is important, as is having fun and working in a positive social environment. These values are not new among the workforce, as indicated by Kornhauser (1965), who found that many employees regarded good personal relations with their co-workers as a principal source of pleasure at work.

Issues related to job control were raised by several respondents, as in being empowered and having input and autonomy. Other factors included meeting performance standards, quality, and doing one's best. Some stressed the importance of teamwork.

If one were to categorize what was important to nonexempts, three themes seemed relevant: the work itself, climate issues, and security/compensation/benefits. The work-itself category encompassed factors such as challenge, accomplishment, variety, and autonomy. The climate category encompassed relationship issues, being appreciated, knowing expectations, social support, and having input. And the security-compensation-benefits category encompassed factors such as job security, benefits, good pay, and flexible work schedules.

Satisfaction

We asked participants if, in view of their past work, they were satisfied with their current positions. Our intent in posing this question was to discern if respondents had set and met personal work-life-related goals, and if not, what hindered them. For the most part, however, the responses did not follow that line of thought, but were more literal. Only a few mentioned career aspirations or goals when responding to this query. Respondents did however reveal a great deal of individuality in their interpretations of "satisfaction." For some, levels of satisfaction seemed based on how closely they perceived their current jobs reflected the characteristics they had cited as important to them in their work. As one participant noted, "...the job that I have now meets a lot of my needs as a job. . . There are times when I come in an hour early just because it's cool to be there."

Many appeared to measure current job satisfaction by making comparisons with past work experiences, noting that this environment or position compared favorably or unfavorably with previous workplaces. For example, several agreed with the statement made by one person that "this is the best place I've ever worked." Similarly, some respondents asserted that they were quite satisfied with their current positions and workplaces, and that they saw no need to consider other options. This comment illustrates that perspective:

> When you talk about career goals, I think most of the people in this plant, even the majority of the ones that are in the plant in manufacturing, in the front line are happy with their jobs and as long

as the company is here, they are going to be here. They don't have a feeling or need to move up. They are making a good wage.

Responses also varied somewhat by organization. Most of the employees in the manufacturing facility indicated satisfaction based on their perceptions that they were paid well, had good benefits, were treated fairly, and made a product of use to society. The financial institution had been experiencing some changes over time, so several employees of longer tenure expressed a preference for the past over the present, perceiving that employees were treated better by the company and had more opportunities for advancement and reward in the "old days." An example offered by one respondent:

In the past, my understanding is, years ago, when people took classes, they were rewarded for it, given raises, given a $50 or $35 bonus check. They were rewarded, so most people stopped taking classes when they weren't rewarded any more.

Participants from the educational institution acknowledged low pay as something they disliked, but they saw the benefits package and job flexibility as balancing out pay concerns.

Reasons for satisfaction seemed to cluster around the nature of the work, the work environment, and perception of appropriate remuneration. Sources of dissatisfaction included failure to fulfill earlier aspirations and failure to gain advancement.

Professional Development Activities

Many responses to the question regarding activities individuals had participated in to help with their current or future work focused on traditional HRD activities. For example, many respondents had engaged in internal and external training opportunities. A wide variety of training topics were discussed as the focus of these programs including computer applications, communication skills, product knowledge, technical information relevant to the specific job, and courses that led to professional certifications or designations. Additionally, several of the participants had taken advantage of tuition reimbursement/reduction programs to pursue their college education. All three organizations provide some form of financial support for employees' higher education.

Less traditional activities frequently mentioned included serving on committees and assisting with special projects. One participant stated, "I volunteer for several things. I feel that this is probably where opportunity lies . . . it opens my eyes to a lot of things within the company. . . ." Other discussants talked about participating in team meetings and serving on safety committees or a clerical/service staff committee within their organization. Still others cited community volunteer work (i.e., United Way and Junior Achievement) as being helpful professionally and satisfying on a personal level.

In general, respondents employed by the financial service organization and the educational institution felt networking was an important career development activity. One individual discussed the importance of networking to advance in one's career, stating, "I get to know the high ups and I believe networking goes very far. . . ." Others mentioned increased knowledge and teamwork as benefits of networking.

Effects of Activities

Many of the effects of the activities pursued by respondents were intangible or not directly applicable to their jobs. In fact, the most intangible of outcomes was no perceived effect whatsoever. Closely related to the no-effect answer was frustration, an outcome resulting from unmet expectations. Some respondents, mostly those who had pursued higher education, had expected results (e.g., promotions or transfers into other types of positions) that did not materialize, resulting in frustration. One respondent who devoted much of her discretionary time in pursuit of a college degree expressed this poignantly: "It's like I spend all of my time in class away from my family and my kids and this degree is really worth nothing."

Some activities were not pertinent to respondents' current jobs but to potential future jobs or careers. A few of our respondents used tuition reimbursement as a means of preparing for a career in a different field. Others indicated further education was a way to increase their marketability in case they need to find another job.

Another category of effects revolved around new perspectives. A few respondents told us that their developmental activities had opened their eyes, giving them different perspectives and readjusting their ways of thinking. One person told us that the courses she had taken toward her master's degree had exposed her to how classmates view their employers, giving her more perspective with which to consider her own employer. Another said that she had gained a new perspective on her supervisor's job as a result of attending meetings on the supervisor's behalf. Understanding other people better was an outcome mentioned by some.

More confidence and enjoyment were also mentioned as outcomes. One respondent told us her developmental activities had made her job more enjoyable by allowing her to meet more people in other parts of the organization. Another respondent told us that, although pursuing developmental activities was sometimes uncomfortable, it had resulted in more self-confidence.

Although mentioned about half as frequently as intangible effects, our respondents did mention some more tangible outcomes of developmental activities. For example, one respondent told us that, as a consequence of her development, "people look to you." We were also told that developmental activities had resulted in employees gaining more responsibility.

In some cases developmental activities improved the day-to-day experience of employees by making their jobs easier and reducing their stress. Also some employees were able to apply their learning activities outside of work. Two participants had pursued developmental activities that helped them establish businesses. The driving force behind these efforts seemed to be a desire for more financial security.

To summarize, we did not hear about many effects of developmental activities from our respondents. The effects we heard about could potentially be grouped into two categories: personal and organizational. The personal category includes outcomes such as new perspectives, increased self-confidence, enhanced marketability, finding out something is not one's calling, and acquiring skills useful outside of work. The organizational category could include outcomes such as acquisition of skills useful on the job, assumption of additional responsibilities, and enhanced leadership ability. Of course, some effects could fit into more than one category, such as gaining a better understanding of others and reduced stress.

Additional Activities Respondents Thought Would Be Helpful

Respondents mentioned various formal company-sponsored activities they believe would be helpful. The first was refresher training to keep up with the latest developments in procedures and work rules. Another was exploration sessions using personality instruments to help employees learn about themselves and others. Training classes employees could leave work to attend were also mentioned. In one of the organizations, many employees pursued various designations/certifications, and structured classes were desired to help master the subject material.

Respondents mentioned a greater number of informal on-the-job activities than formal or offsite activities. For example, they indicated it would be helpful to have opportunities to see how their job fits into others, as would seeing what others do on the job. The feeling was that this would help employees more effectively work with and support each other. Shadowing others who do the same work was also mentioned as potentially helpful. In this case, the respondent seemed to be referring to counterparts doing the same work at other locations. A maintenance employee suggested it would be helpful for employees to train one another on what they know. A nonexempt working in an office environment suggested that time to study at one's desk would be helpful. A few other employees expressed a desire to engage in the voluntary community service activities their employer supports.

Respondents told us that more encouragement to learn and grow would be helpful. If employees are motivated to learn about what goes on in another part of the organization, the feeling was that they shouldn't be discouraged from doing so. Rewarding employees for completing developmental activities (i.e., courses) also was viewed as helpful.

In sum, we did not hear about many additional developmental activities that nonexempts felt would be useful to them, nor was there a lot of convergence. There was a feeling that removing some barriers to development, encouraging employees periodically to complete a course or try something outside their immediate work role, and supporting their efforts to do so would be helpful.

Other Issues

At the close of our questioning, we always asked if there was anything else relevant we should hear about from respondents. At this time we often heard about difficulties encountered by those seeking to develop themselves. In one organization where there is currently a big drive for cutting costs, respondents said they felt hesitant to ask to attend courses for which their department would be charged. As one respondent explained, "it is very hard when you are stressing cost reduction, cost reduction, and you're seeing all of these job eliminations and people are just being let go, you think that maybe I really don't want to take this class right now." Some said they were receiving cues from supervisors indicating reluctance to approve training because of the expense. Other respondents talked about work piling up while they were gone from the job attending classes, making it punishing to return to a job and confront an overload of waiting tasks. On a similar note, respondents mentioned guilt about co-workers having to cover for them while they were away at training.

This open-ended part of the focus group sessions also uncovered some eye-opening information about people who do not want to develop their careers. Respondents in one organization indicated that employees were being forced to create career development plans including goals and desired future jobs. Respondents made it quite clear to us that some people are happy where they are in the organization and do not want to move up or change jobs. They were careful to point out that this didn't mean that they were not willing to learn what was needed to continue to perform their jobs proficiently. The point was that some employees are very good at what they do and happy doing that, and forcing them to prepare a growth-oriented career development plan was seen as counterproductive.

Another major line of discussion was around qualifications for supervision. At the manufacturing firm we visited there was a strong feeling among nonexempts that too much emphasis was being placed on college degrees as a requirement for supervision. The nonexempts felt the company was losing money by bypassing people who could be good supervisors but who were, for one reason or another, unwilling to pursue higher education. Several respondents told us they want "a go-to" person in their supervisor; someone who knows the technical side of the job and who can answer their questions. Their feeling was that some of the college-educated supervisors did not understand the technical part of the job and were not willing to learn. There was strong sentiment among respondents at this company about this issue, making it hard to dismiss it as a typical blue-collar, white-collar perceptual difference.

Conclusions and Implications for HRD

As noted in Merriam (1998), "One of the assumptions underlying qualitative research is that reality is holistic, multidimensional, and ever-changing, it is not a single, fixed, objective phenomenon..." (202). This quote was well illustrated by the data obtained from our participants. The complexity and diversity of their perspectives provided us with a wealth of material that could not be categorized easily. This study has yielded interesting insights, but at the same time, it has prompted questions; which is, of course, the "ever-changing" aspect of qualitative work.

The results of this study indicate that those satisfied with their current positions tentatively fall into two groups. One group is happy with their current positions; they do not choose additional career advancement, they like the work they do, and they perceive they are treated well by their employers in terms of pay and recognition. Members of the other group are happy with their current positions, because they like the work and see opportunities for career advancement in an organization they believe provides sufficient remuneration for their efforts.

Conversely, those dissatisfied with their current positions typically perceive that they are not being adequately rewarded for their work, and they do not see opportunity for advancement to gain additional pay or prestige. One other tentative grouping includes those who are planning for future careers unrelated to their current jobs. Some seem grateful for an opportunity to work while they prepare for their next venture; others appear eager to leave, and in fact, their choice to change careers may be a reaction to their current dissatisfaction.

Lack of tangible outcomes of career development activities was a source of frustration for some respondents. More specifically, disappointment and frustration that a college degree hadn't resulted in promotions was a major source of complaint. There seems to be a need for more realistic expectations among some nonexempts about what a college degree can and cannot do for one's career. Also, if there are other developmental needs or deficiencies employees need to overcome, they need to hear about these so that they can choose whether to do something about them. Employees need to be given the full picture of what is needed for higher positions along with their current strengths and weaknesses. Managers need to provide this type of developmental feedback and HRD professionals often may be able to help them with this task. The dissatisfaction resulting from unmet expectations can be severe, and much of this dissatisfaction seems preventable.

These results suggest that fairness issues may influence nonexempt employees' career development. The perception that career development activities did not result in tangible outcomes may be both a fairness and psychological contract issue. As Wooten and Cobb (1999) note more research is needed to explore the relationship between CD and organizational justice.

HRD can play an important role in helping organizations assess nonexempt employees' career needs and then targeting programs to meet these needs. Those individuals expressing satisfaction and demonstrating few career aspirations may benefit most from initiatives designed to update their current skills and knowledge. It is important that HRD not ignore this group, but rather use them as subject matter experts, coaches, and on-the-job trainers. Those wishing for advancement opportunities may need and desire a larger set of HRD initiatives that might assist them in furthering their careers. Informal learning opportunities, mentoring, and career planning workshops are a few examples of the activities this group of nonexempt employees would find beneficial.

The participants in this study did not mention many HRD initiatives they had participated in, nor did they mention many they felt they had missed. For example, no one mentioned mentoring or job rotation, two common career development activities. We do not know why this was the case, and that prompts further questions. For example, are nonexempt employees unaware of the opportunities available to them? Do companies limit their access to HRD programs? Is the assumption made that nonexempts are not interested in pursuing these types of activities? A more focused study, employing quantitative methods may help answer some of these questions.

We believe the HRD community should recognize nonexempt employees as both primary stakeholders and as potential allies. A better understanding of their experiences and perceptions will help meet nonexempt employees' needs and build their capabilities. This will release untapped potential within the nonexempt workforce, thereby helping to maximize workforce performance and organizational effectiveness. It will also help the HRD profession become more inclusive in its efforts to promote personal growth and career development.

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Is Work Sharing a Better Option for Organizational Development?

Steve L. Whatley
Chan Lee
Lisa Moten
The Ohio State University

To obtain first-hand information about work sharing, the authors traveled to Wolfsburg, Germany and conducted interviews with Volkswagen organizational development employees and observed workers in the work environment. The implications of this paper indicate that work sharing is successful in Germany and that human resource development professionals should conduct further research into work sharing as a viable alternative to employee layoffs.

Keywords: Work Sharing, Job Sharing, Job Security

Job sharing has grown successfully over many years in Germany. Following the lead of Volkswagen, ten German industries agreed to implement work sharing in 1995. The success in Germany raises the question as to the potential for work sharing in the United States as an alternative to mass layoffs, i.e., layoffs involving 50 or more employees. Blyton and Trinczek (1997) explained work sharing as reducing working time to prevent mass dismissals. Cummings and Worley (2001) defined job sharing as "two people sharing a fulltime job" (p. 429) and discussed using job sharing as an alternative to downsizing or layoffs. Essentially, work sharing is a trade off between working fewer hours for less money and retaining a job versus losing a job completely.

Since 1992, the United States experienced a steady decline in the national unemployment rate until the latter portion of 2000 when unemployment began a steady increase. According to the Bureau of Labor Statistics (January-August, 2001), since mid-1999, mass layoffs have increased with few exceptions during the second and third quarter of 2000.

The number of people affected by these events has doubled since mid-1999 with a slight decrease in unemployment during the second quarter of 2001. The period January-August, 2001 was significantly higher than for the same period in 2000. In August 2001, manufacturing accounted for 41% of all mass layoffs and 49% of all people laid off. Industries included electronics, transportation, etc (Bureau of Labor Statistics, August, 2001).

In September 2001, employment fell by 199,000 although unchanging the unemployment rate of 4.9% up from 3.9% one year ago (Bureau of Labor Statistics, September, 2001). A month later, job losses were spread across most industry groups, with particular large increases in unemployment in manufacturing and services. The Bureau's report was the first since terrorists attacked the World Trade Center on September 11th. Although the U. S. economy was weakening before the attacks, this downturn was exacerbated by the event of September 11th. The lack of demand for products and services encompassed 28% of all mass layoff events. Less than two out of five employers with layoffs in the third quarter of 2001 expected recalling employees. The manufacturing industry experienced 40% of all mass layoff events up from 37% one year before (Bureau of Labor Statistics, October, 2001). In November 2001, 42% of all mass layoff events involved the manufacturing industry (Bureau of Labor Statistics, November, 2001).

Again, the extensive use of mass layoff versus the success of work sharing in the Germany raised two research questions: First, to what extent does the literature address themes and issues on job sharing to avoid mass layoffs? Second, to what extent do the factors that influence the success of job sharing in Germany, using Volkswagen as a benchmark, differ from factors concerning job sharing in the United States?

Methodology

The authors first sought to determine the extent to which the literature addressed work sharing, or job sharing, as it is known, in the United States and its application to mass layoffs. It is important to note that because of the absence of academic articles related to work sharing the authors were required to use resources from either professional or popular journals. However, to learn about work sharing firsthand, they traveled to Germany and observed the work sharing program at the Volkswagen's headquarters in Wolfsburg in May 2001.

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Findings

Literature Search

Four databases from two disciplines, education and business, were searched on October 7th. These databases included the Educational Research Information Center (ERIC), Education Abstracts, ABI/Inform Global, and Business and Industry. Two of the databases, ERIC and ABI/Inform Global, were used because of being recognized as "major resources in HRD Research Literature" (Swanson and Holton, 1997, p. 186). The ERIC and Education Abstracts databases represent the education aspects of work sharing, while ABI Inform and Business and Industry databases represent the business and industry aspects of work sharing.

Key terms used in the search were work sharing and job sharing. It is important to note that the ERIC database identified the key term job sharing as a synonym of work sharing. The ERIC, Education Abstracts, ABI/Inform Global, and Business and Industry databases were searched using each key term from 1966, 1983, 1971, and 1994 respectively.

A total of 845 articles were found in all of the databases combined. The ERIC contained a total of 82 articles. All 82 articles were located using the key term job sharing, while no records were found using the key term work sharing. The Education Abstracts search revealed a total of 42 articles. Two records were found using the key term work sharing, and 40 records were found using the key term job sharing. The search in the ABI/Inform Global database revealed 640 articles with 303 articles found using the key term work sharing, and 337 records were found using the key term job sharing. The Business and Industry database contained a total of 81 articles with 22 found using the key term work sharing and 59 found using the key term job sharing.

Type of Articles

Once the records were categorized according to key term, they were then classified by type of article: popular, professional, and academic. Popular articles were defined as articles intended for the general population. Professional articles were defined as articles intended for practitioners. Academic articles were defined as peer-reviewed articles and published in scholarly refereed journals (See Table 1).

Within the ERIC database, 63 of the records were classified as popular articles while 19 articles were classified as professional articles. The ERIC database did not contain any academic articles. Within the Education Abstracts database, 34 articles were classified as popular articles and seven were classified as professional articles. The Education Abstracts database did not contain any academic article. Within the ABI/Inform Global database, 512 articles were classified as popular articles, while 126 were classified as professional articles. There were only two academic article found in the ABI/Inform database (Blyton and Trinczek, 1997; Singh, 1999). The Business and Industry database search revealed 72 articles that were classified as popular articles, while nine articles were classified as professional articles. Again, as in the previous three databases, no academic articles were found in the Business and Industry database.

Work Sharing at Volkswagen

In the 1980s, Volkswagen's strategy involved the introduction of new technology and process automation as the principal route to increased productivity and lower costs, a strategy widely shared in Germany during that period. However, work cycles were longer and work pace slower with the initial adoption of the technology-driven strategy resulting in little room for team and group-work practices popular elsewhere. By the late 1980s, rising labor and other costs, created internal discontent within the company and planners retreated from ambitious automation targets resulting in huge losses in 1991 and 1992 (Tolliday, 1995).

The idea of work-sharing, which is redistributing available work by reducing the working hours and pay of employees, gained an increasing profile in German industrial relations as a result of Volkswagen's pioneering agreement with labor in 1993. Volkswagen's commitment was to secure stable and stimulating working, learning, and living conditions for the long-term (Phillips, 1987). Management's commitment to labor was evident during the authors' visit to Volkswagen's headquarters. In 1995, labor and management came to a work sharing agreement that included management's guarantee of jobs: Positions that included 30 hour workweeks and pay for overtime. Volkswagen used 450 different work schedules to accommodate work sharing (Whatley and Lee, 2001). The adjusted workweek schedule resulted in an increase in productivity and a reduction in absenteeism (Huberman, 1997).

Interview sources were quick to point out that maintaining positive relations with labor has proven to be in the best interest of Volkswagen's stability and longevity as well as promoting the German government's policy and in fact, the German philosophy, of social partnership.

Particular characteristics appear to be prevalent throughout Volkswagen's history as they pertain to the organization's culture. Open communication, harmony, dialogue and cooperation are attributed to the overall success of labor-management relations and thus Volkswagen's success. The labor-management relationship lead to cooperation in solving some of Volkswagen's most pressing problems including improving technology at the cost of losing production jobs, lowering production costs, and implementing work sharing.

Factors Contributing To Success

There are several satisfactory reasons why Volkswagen implemented work sharing versus mass dismissal to solve over-employment problems, which also serves as bases for use of work sharing in the United States, such as: layoffs would have damage cooperative relationships between labor and management. Based on the *Soziaplan* in the Works Constitution Act, German companies consider social criteria like age, family status, and length of service before terminating employees. Thus, labor groups in Germany have inherent power unheard of in the United States. Conversely, management in the United States, has virtually unlimited power to effect mass layoffs rather than seek other alternatives that could prove just as beneficial. In essence, the process employing the best person, the appropriate number of employees and using an effective employment process becomes less important and employees become expendable.

Since the local government of Lower Saxony is the primary stockholder in Volkswagen, it is doubtful that a mass dismissal plan would be implemented. These reasons do not mean work sharing is negative. Work sharing has provided several advantages to the company including saving labor costs of 1.6 billion DM in 1994 (Blyton and Trinczek, 1997). Even if Volkswagen saved these labor costs by mass dismissal, it would eventually acquire recruitment and training costs in the future, as is experienced commonly in corporate America. However, because of work sharing, Volkswagen has maintained quality standards by retaining existing work groups. Also, since Volkswagen guarantees job security, it assists in raising productivity; otherwise, workers would hesitate to suggest ideas for improving processes because of fear that their ideas may reduce the number of jobs (Blyton and Trinczek, 1997; Whatley and Lee, 2001).

Consideration for Work Sharing in the United States

Organizations across the United States have engaged in downsizing, most recently referred to as "rightsizing". Regardless of the term used, rightsizing in many situations is nothing less than mass layoff. Organizations have taken this "developmental" approach to streamline their organization by ridding itself of multiple layers of management no longer seen as necessary or useful.

In the process of rightsizing, organizations may in effect reduce overhead as it relates to labor costs, however, losses are also experienced by the organization as well. Organizations lose experienced workers, who possess core competencies for future growth, but also at some point need to be replaced and retrained for the positions once held by the "rightsized" employee (Cummings and Worley, 2001). Stated differently, positions once eliminated are restored.

Rightsizing creates problems within the organizational climate by creating distrust with employees who question their future with the organization. In other words, employees not knowing about the longevity of their employment may be apprehensive about offering their continued loyalty to an organization that may or may not demonstrate its loyalty by providing continued employment. In the long-term, "rightsizing" begs the question: Is rightsizing developmental? Therefore, work sharing should be considered as a better alternative rather than rightsizing for organizational development.

Implications For Human Resource Development

Human resource development implementation of work-sharing at Volkswagen demonstrates not only maintenance of the primary work-sharing ground rules such as reduced working hours, decreased income, and guaranteed job security but also essential compromises with its union in recompense for the job security and hourly wage increases.

However, there are several important points to consider for the successful transferability of organizational

change in Volkswagen or in organizations in the United States: First, the employer's approach to solve over-employment problems is critical. Even within the German auto-industry, Daimler-Benz has continuously worked on mass dismissals because of management's belief that work sharing like Volkswagen's case would just delay problems rather than solve them.

Second, employees at Volkswagen already had been paid relatively high wages before implementing organizational change strategy. It would be much more difficult to make an agreement with workers in lower wage companies. Third, even if work sharing at Volkswagen functions as a short-term solution, it does not guarantee job creation (Heuser, 2000). Although having a part-time job is better than not working at all, it is still not an ideal alternative.

Conclusion

Two major themes concerning work sharing aimed at organizational development have been raised in this paper: the absence of HRD research concerning work sharing and the limited use of work sharing as an alternative to mass layoffs in the United States.

The limited use of work sharing in the United States may link directly with the absence of HRD research concerning work sharing, thus, verifying a gap between HRD research and practice. The literature on work sharing is limited to either professional or popular journals rather than academic sources. Though there is difficulty because of the absence of academic research on work sharing issues, HRD professionals should focus on work sharing/job sharing to support organizational development efforts in becoming more "developmental" rather than "detrimental." Further research should focus on the planning and implementation process of work sharing to provide empirical validation of HRD role in organizational development.

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Table 1. *Journal by Database*

As of October 7, 2001	Total DB count when searched	Descriptors	Total numbers of the records	Type of Journal		
				Popular	Professional	Academic
ERIC:		Work Sharing	0	0	0	0
Since 1966	1,068,797	Job Sharing	82	63	19	0
Education Abstracts:		Work Sharing	2	1	1	0
Since 1983	536,965	Job Sharing	40	33	7	0
ABI/Inform Global:		Work Sharing	303	237	65	1
Since 1971	1,983,774	Job Sharing	337	275	61	1
Business & Industry:		Work Sharing	22	13	9	0
Since 1994	2,222,611	Job Sharing	59	59	0	0
		Work Sharing	327	251	75	1
Sub-Total		Job Sharing	518	430	87	1
%			100	80.6	19.2	0.2
Total	5,812,147		845	681	162	2

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College of Technology
Bowling Green State University
Bowling Green, OH 43403-0301

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